



2016 annual customer survey results

1450

Customers were
contacted

25 %

replied

67%

Were satisfied with our
service

You ...

- ✓ told us what we did well
- ✓ told us we could do some things better

We ...

- ✓ identified **actions** we want to take to make things better
- ✓ will publish these in our business plan

Area	We will	Update/action
EPOAR Pre-registration service	<ol style="list-style-type: none"> 1. Publicise the 'Contact Details' template in EPOAR for entering Sender's details 2. In the next iteration of EPOAR, find out if it's feasible to pull details from one case into another. 3. We have rectified the issue with the maiden name and provided clarification on the EPOAR site. 4. We are investigating the cryptic error message code with our IT provider, as a message should appear if the document size exceeds 2MB. 	
EPOAR Post-registration service	<ol style="list-style-type: none"> 1. We have asked our supplier to update the e-mail sent confirming payment. This e-mail will have a link to our news page which advises of the current processing times. 2. We know that our turnaround times could be better. We have recruited 2 extra members of staff to help process PoAs. Once trained this will help improve the turnaround times. 3. We have asked our supplier to look into the possibility and cost of adding the name of the granter to the top of the EPOAR page. 4. We will look into the issue raised about the quality of the documents 	

	<p>5. We are looking into the possibility of having a public system that could be used to search for registered PoAs. This may offer solicitors an option to search for PoAs not submitted through EPOAR.</p>	
<p>Access to funds scheme</p>	<p>1. Review the “Guide for Withdrawers” booklet with a view to providing clearer guidance in relation to the keeping of receipts and will look at providing additional space so that it is easier to record expenditure</p>	
<p>Guardianship</p>	<p>Early intervention</p> <ol style="list-style-type: none"> 1. Include reference to costs in our pre-appointment leaflets and update the website and guidance material with information about costs involved with guardianship 2. Raise awareness with financial guardians that they should contact us if organisations not recognising their authority. We will also do some work on raising awareness with financial institutions. 3. Make sure caution forms are sent out on time with letter 4. Consider changes for new versions of inventory form around estimating costs of household items 5. Advise about availability of fee exemptions if meet criteria 	
	<p>Inventory & management plan</p> <ol style="list-style-type: none"> 1. Review our contact with financial institutions to make aware of 	

	<p>our role and of guardianship orders</p> <ol style="list-style-type: none"> 2. Make our guidance clearer that full powers are only available when the inventory and management plan is approved. 3. Make sure our letters, forms and guidance are in plain English. 	
	<p>Simplified accounting</p> <ol style="list-style-type: none"> 1. When developing new case management system consider building in a step to keep customers informed of progress of account. 2. We will let guardians know that our processing times are updated weekly and can be viewed on the news page of the website. 3. We will review the format and look of the simplified account form. 4. We will clarify in our letter, guidance and website the purpose of this form and highlight that limited information is all that's required. 5. We will carry out a feedback exercise to find out how useful / helpful the website is and what needs improving. 	
	<p>Consents</p> <ol style="list-style-type: none"> 1. Review our guidance notes and provide examples of the pitfalls that can be experienced. 2. Make message stronger and clearer in our literature and 	

	<p>website when property can be marketed and the process can take longer if a party lives out with Europe.</p> <ol style="list-style-type: none"> 3. Ensure that our letters have direct dial telephone numbers for staff dealing with their application. 	
	<p>Renewal</p> <ol style="list-style-type: none"> 1. Keep sending reminder at 6 months stage 2. Tackle the waiting time for annual accounts 3. Update information leaflets and website with diagram of the stages and steps 	
	<p>Discharge</p> <ol style="list-style-type: none"> 1. We will update our letters and literature to better inform guardians that the website is available and is a useful source of reference. 2. Carry out a review website and guidance to make sure the content is in plain English and easy to follow. 3. Provide a diagram outlining all the stages in the process and add to key leaflets for those thinking about applying to become a guardian. Consider adding something similar to other 	

guidance for financial guardians.

4. Make it clearer in our letters, literature and website who needs to apply for discharge.
5. Consider including the discharge form with the final account.